

# Automations for SAP Business One

*Automate the repetitive, daily tasks that slow your business down.*

Manual processes bog down critical resources and prevent you from spending time on strategic initiatives that move the business forward.

## Automations for SAP Business One

transforms manual tasks into automated workflows that simplify business operations, prevent costly mistakes, and save precious time.

Each automation delivers specific business outcomes to ensure a strong return on your investment.

- Improves cash flow**
- Saves time on administrative tasks**
- Increases process efficiency**
- Eliminates costly mistakes and oversight**

### Flawless operations. No surprises.

*Automations for SAP Business One is powered by Saltbox. That means it extends SAP Business One's functionality without compromising system performance or generating intrusive client-side pop-ups.*



## Automations for SAP Business One

### Inventory and Production

**Create subassembly work orders automatically.**  
*Avoid production delays. Reduce administrative work.*

This automation scans SAP Business One for newly created production orders with subassembly components and automatically creates a new work order component for each one.

**Change the status of work orders automatically.**  
*Keep production cycles moving. Reduce administrative work.*

This automation scans SAP Business One for production orders with the status 'planned' and changes them to 'released' so the orders can progress through the production cycle.

**Calculate min max inventory levels automatically.**  
*Prevent stock shortages and costly surpluses. Eliminate manual min max calculations.*

This automation uses historical sales data and product lead time to calculate min max inventory levels for each item master at regular intervals. Min max levels can be calculated at the item or warehouse levels.

### Finance

**Defer revenue and raise recurring invoices for service contracts automatically.**  
*Close the books faster. Improve cash flow.*

This automation raises invoices for service contracts per the billing contract schedule and posts a journal entry to the deferred revenue account. At the end of each month, the automation scans all deferred revenue entries, calculates how much of that liability should be realized as revenue, and creates a new journal entry in the revenue account equal to the proportion of services delivered. A debit is also made to the deferred revenue account.

**Create A/R invoices for open delivery notes automatically.**  
*Always issue timely invoices. Improve cash flow.*

This automation scans SAP Business One for open delivery notes and creates an A/R invoice for each one. Invoices are linked back to the delivery note and sales order.

**Create supplier self-invoices for consignment inventory automatically.**  
*Eliminate manual inventory counts and invoice creation.*

This automation scans SAP Business One for goods issue and goods issue for production to determine how much inventory was used since the last A/P invoice was issued to the supplier. SAP Business One then raises a new A/P invoice to the supplier so they can be paid for the items consumed. Multiple goods issues are automatically consolidated onto a single invoice.

**Create liability accruals automatically for non-inventory and service goods receipt purchase orders (GRPOs).**  
*Save time. Eliminate manual journal entries.*

This automation scans SAP Business One for open service type and non-inventory goods receipt purchase orders (GRPOs) and creates a reversing journal entry that posts an accrual for the open value of the GRPO.

**Put customers on hold automatically when payment is overdue.**  
*Avoid selling to high-risk customers. Eliminate manual account reviews.*

This automation scans SAP Business One for overdue invoices and adds a 'payment overdue' comment to the customer's account. The account status is then changed to 'inactive,' preventing the customer from placing new orders until their outstanding bill is paid.

### Sales

**Create pick notes for open orders automatically.**  
*Prevent orders from falling through the cracks. Eliminate manual creation of pick notes.*

This automation searches SAP Business One for open orders that haven't been sent to pick and checks inventory levels. If inventory is sufficient, the automation creates a pick note so the order can be filled.

**Create back-to-back orders automatically. Prevent fulfillment delays and missed orders.**  
*Stop creating purchase and production orders manually.*

This automation scans SAP Business One to determine if there's enough inventory to fulfill new sales orders. If inventory is insufficient: (1) for items flagged as 'buy,' a purchase order will be raised to the item's preferred vendor, or (2) for items flagged as 'make,' a production order will be created.

**Create follow-up reminders for sales quotes automatically.**  
*Close more deals.*

This automation scans SAP Business One for new customer quotes and creates a reminder activity for the account owner to follow up.

**Create opportunities from sales quotes automatically.**  
*Use SAP Business One's pre-built opportunity reports. Improve pipeline visibility, accuracy, and sales forecasting.*

This automation scans SAP Business One for new sales quotes, creates a new opportunity for that quote and links the two documents. If an existing quote changes, the linked opportunity is updated. If an order is attached to a quote that has been closed, the opportunity status changes to 'won'. If a quote was closed but an order was not placed, then the opportunity status changes to 'lost'.

### Service

**Terminate service contracts automatically when they reach their end date.**  
*Avoid booking service calls on lapsed service contracts. Eliminate manual cleanup of service contract data.*

This automation searches SAP Business One for active service contracts with lapsed end dates and changes their status from 'active' to 'expired.'

**Create A/R invoices for open delivery notes automatically when a service call closes.**  
*Invoice every service call upon completion. Avoid billing and payment delays.*

This automation searches SAP Business One for open delivery notes related to closed service calls and generates an A/R invoice for the open deliveries. Open delivery notes are then closed, and invoices are linked to their service calls and delivery notes.

New automations are released every month. [Visit our website](#) for the complete list.

## Customize Your Automation

Although Automations for SAP Business One is designed to automate specific business transactions and processes, no two companies are alike. SAP Business One queries and Saltbox workflows, the key components of these automations, are easily customized, ensuring that the solution you buy addresses your business requirements—not someone else's.

**Contact us today.**



### A Trusted Partner

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**United States**  
7545 Irvine Center Drive,  
Irvine Business Center, Suite #200  
Irvine, CA 92618  
Tel: +1 949 420 3300  
contact@vision33.com  
[www.vision33.com](http://www.vision33.com)

**Canada**  
210 Water Street,  
Suite #400  
St. John's, NL A1C 1A9  
Tel: +1 709 722 7213  
contact@vision33.com  
[www.vision33.ca](http://www.vision33.ca)

**Europe**  
1 Heathgate Place, Unit 1  
75-87 Agincourt Road  
London, UK NW3 2NU  
Tel: +44 (0) 20 7284 8400  
info@vision33.co.uk  
[www.vision33.co.uk](http://www.vision33.co.uk)